

# Survey task

The survey task allows the surveyor to enter all information required to plan out the installation in one location. Surveyors can answer the questions and add additional comments. They can also upload images and apply image annotations. A PDF report of the survey can be generated from the reports drop-down in the main navigation.

## Accessing the survey task

From any project, click on the **Tasks** option in the main navigation menu, then select **Surveys**.

## Filling out a survey

The survey is divided into sections that can be viewed and navigated between using the right-hand menu.

Projects Tasks Components Forms Reports Help My Account 

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How many elevations of scaffolding will be required?

For each elevation that requires scaffolding, please give a description of its location, length and height.

Are any obstacles to be considered when erecting scaffolding?

Yes  No

Is permission required from a neighbour / third-party / council for scaffolding?

Yes  No

**Images to show:**

1. All elevations where a scaffold is required
2. Length and height of scaffold
3. Locations for scaffold pads
4. Include photos and dimensions of objects to scaffold over (such as conservatories etc)

 Upload Images

JPEG, PNG

Is planning permission or conservation area consent required?

Yes  No

Any further comments for this section?

**Images to show:**

Anything else of relevance in this section

 Upload Images

JPEG, PNG

← Project Overview

## Solar Survey

Access and safety

Roofs

Loft access

Existing electrics

PV inverter

Battery system

Communication cables

Additional comments and images

Exit Next

## Uploading an image

There are various places throughout the survey where pictures can be uploaded and annotated. **Click on the Upload Images box** and it will bring up the option to upload a picture from your files. If you are on a mobile or tablet device it will give you the option to take a photo. You can

repeat this step to add multiple images

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 Upload Images

JPEG, PNG

Is planning permission or conservation area consent required?

Yes  No

Note that .heic files (usually from mobile devices) are not supported at this time. If your phone, tablet, or camera is set to save pictures in this file format, please change this to save .jpg files in settings.

## Adding annotations to your images

Once the file has been uploaded, you can **click on the picture to bring up the annotation options.**

- Use the bin button to delete annotations or the whole image.
- The cursor lets you select annotations you have added to the image.
- The pencil allows you to draw or write free-form.
- The 'T' is used to create a text box.
- The arrow lets you draw an arrow.
- The colour box is where you can change the colour of annotations.
- The tick mark saves your annotations and exits the annotations editor.

## Accessing your survey as a PDF report

After the survey is complete, the report can be found in the **Reports** drop-down. Annotated images, question responses, and an image of the roof layout will be carried forward to the survey report.

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